Hawk Center Fall Investment Conference 2014

Speakers will include:

- Michael Mauboussin - Director of Global Strategy, Credit Suisse
- Jeff Rosenberg - Chief Fixed Income Investment Strategist, Blackrock
- Daniel Dowd, Ph.D - Equity Portfolio Strategist, Bernstein Research
- Dick Hokenson - Global Demographics Analyst, ISI Group
- Bo Ryan - Head Coach, Wisconsin Badgers basketball team
- François Ortalo-Magné - Dean, Wisconsin School of Business
- Mike Knetter, Ph.D - President & Chief Executive Officer, UW Foundation
- Brian Hellmer, CFA, CIPM - Director, Hawk Center for Applied Security Analysis
- Mark Ready, Ph.D - Academic Director, Hawk Center for Applied Security Analysis

**Speaker Bios and Headshots**

**Michael Mauboussin - Director of Global Strategy, Credit Suisse**

![Michael Mauboussin](image)

Michael J. Mauboussin is a Managing Director of Credit Suisse in the Investment Banking division, based in New York. He is the Head of Global Financial Strategies, providing thought leadership and strategy guidance to external clients and internally to Credit Suisse professionals based on his expertise, research and writing in the areas of valuation and portfolio positioning, capital markets theory, competitive strategy analysis, and decision making.

Prior to rejoining Credit Suisse in 2013, he was Chief Investment Strategist at Legg Mason Capital Management. Mr. Mauboussin originally joined Credit Suisse in 1992 as a packaged food industry analyst and was named Chief U.S. Investment Strategist in 1999. He is a former president of the Consumer Analyst Group of New York and was repeatedly named to Institutional Investor's All-America Research Team and The Wall Street Journal All-Star survey in the food industry group.

Mr. Mauboussin has been an adjunct professor of finance at Columbia Business School since 1993 and is on the faculty of the Heilbrunn Center for Graham and Dodd Investing.

Mr. Mauboussin earned an A.B. from Georgetown University. He is also chairman of the board of trustees of the Santa Fe Institute, a leading center for multi-disciplinary research in complex systems theory.

**Jeff Rosenberg - Chief Fixed Income Investment Strategist, Blackrock**

Jeffrey Rosenberg, Managing Director, is BlackRock's Chief Investment Strategist for Fixed Income. His responsibilities include working closely with the Chief Investment Officer of Fundamental Fixed Income, Fundamental Portfolios and Team to develop BlackRock's strategic and tactical views on sector allocation within fixed income, currencies and commodities.

Prior to joining BlackRock, Mr. Rosenberg spent nearly 10 years at Bank of America Merrill Lynch as the Chief Credit Strategist. His most recent role included coordination of strategy across all Fixed Income, Securitized Assets, Credit, FX and Commodities and formulating tactical and strategic risk-taking recommendations for external clients and internal trading desks. He brought innovation to his credit strategy work producing the first commercialized quantitative corporate credit analytics system from a dealer firm. At BAML, he and his team were consistently ranked in the top Institutional Investor High Grade Strategy Teams and General and High Yield Strategy Teams. The highly regarded Situation Room report, for which he was editor and contributor, continues to be ranked among the top research reports in our industry.

Mr. Rosenberg earned a MS degree in computational finance from Carnegie Mellon, a BA degree in mathematics from the University of Minnesota, and a BA degree in finance from the University of Wisconsin. He has been a Chartered Financial Analyst since 1997.
Dan Dowd is Head of U.S. Equity Strategy and Quantitative Research at Sanford C. Bernstein. Dan joined Bernstein in 2006 as the Senior Analyst covering U.S. Machinery and Capital Goods. He was promoted to Director of European Research in 2010, and then became Director of U.S. Research in 2012, serving in that capacity until 2013, when he took on his current role.

Prior to joining Bernstein, Dan was with McKinsey & Company, where he advised clients across four continents on a broad variety of strategic and operational issues. He was a U.S. naval officer from 1988 to 1992, serving aboard the U.S.S. Bainbridge, which saw service in operations all over the world, including in Operation Desert Storm.

Dan holds a PhD in Quantitative Analysis and Research Design from Yale University and a BA from the University of Virginia. While at Yale, he spent a year as a Henry Luce Scholar in Beijing. In 2009 and 2010, he was named to Institutional Investor's All-America Research Team as a top-ranked analyst in his sector.

Dick Hokenson is a Senior Managing Director and heads ISI’s Global Demographics Research Team. Prior to joining ISI in 2012, Dick founded Hokenson & Company in 2002, an independent consulting firm. Dick spent most of his career at DLJ as their chief economist and then at CSFB, and was a pioneer in applying demographics to economics and markets.

Dick graduated from the University of California at Berkeley in 1967 and received an MA in Economics from the University of Michigan in 1973. Dick did his PhD research at New York University. Dick is a member of the International Union of Social Science Professionals, the Population Association of America, the Society of Labor Economists.
and is a trustee of the Population Reference Bureau (PRB). Dick is a member of the Executive Committee of PRB and chairs the Investment Committee.

Bo Ryan - Head Coach, Wisconsin Badgers basketball team

Since being hired as the head coach at Wisconsin, Bo Ryan has elevated the program to heights previously unseen in Madison. In 2014, Ryan and the Badgers climbed even higher, reaching the program's first Final Four since 2000 and winning 30 games for just the third time in school history.

With over 700 wins, 17 championships and countless conference and national coach of the year accolades, there is little doubt that Ryan is among the great coaches in college basketball history.

Now as Ryan enters his 31st season as a head coach in 2014-15 - his 14th atop the Wisconsin program - it's difficult to decide which is more impressive, his incredible longevity or his unparalleled success. It is, however, safe to say that the combination of the two is what elevates Ryan among college basketball's elite.

Owning the most wins in UW annals (321 entering 2014-15), Ryan became the 40th NCAA coach to reach the 700-win plateau and is one of just five active Division I coaches to reach that hallowed ground. Ryan's career winning percentage of .759 (704-224) is seventh all-time among coaches with 700 career wins. Among Div. I coaches in the 700-win club, Ryan's win percentage trails only John Wooden, Roy Williams, Jerry Tarkanian, Dean Smith and Mike Krzyzewski.

A member of five Halls of Fame, Ryan has been enshrined into the Wilkes College Athletic Hall of Fame (2003), the Delaware County Chapter of the Pennsylvania Sports Hall of Fame (2008), the Pennsylvania Sports Hall of Fame (2011), the Wisconsin Basketball Coaches Association Hall of Fame (2011) and the Wisconsin Intercollegiate Athletic Conference Hall of Fame (2012).
François Ortalo-Magné became the Albert O. Nicholas Dean of the Wisconsin School of Business on September 1, 2011. Building on the school’s tradition of innovation and expertise in applied learning, Ortalo-Magné is positioning the school to transform business education, advancing a bold strategy that redefines the partnership between universities and the business community, in order to address business challenges, inspire leadership, and improve lives.

Prior to his current role, Ortalo-Magné served as the Robert E. Wangard Professor of Real Estate and chaired the school’s Department of Real Estate and Urban Economics. In his role as department chair, he developed an innovative partnership between the school and three leading international business schools—HEC Paris, Hong Kong UST School of Business, and INCAE Costa Rica—to deliver a new degree, the Global Real Estate Masters (GREM).

Ortalo-Magné’s research focuses on the determinant of housing prices and housing market fluctuations, and his academic papers have been published in top economics and real estate journals. He has also published books and monographs targeted at policymakers and general audiences on housing, agricultural, and environmental issues.

Ortalo-Magné has advised the French government on land use and housing policy issues as a member of the Conseil Economique du Dévelopement Durable. He was awarded the distinctions of Counselor of Real Estate (United States) and Fellow of the Royal Institution of Chartered Surveyors (United Kingdom). He has been a regular keynote speaker at international real estate conferences, including MIPIM and AFIRE.

Prior to joining the Wisconsin School of Business in 2001, Ortalo-Magné was a tenured faculty member of the Economics Department at the London School of Economics. He received a Ph.D. in economics from the University of Minnesota in 1995 and a Masters in Agricultural Engineering and Management (Ingénieur Agricole) from France’s Ecole Supérieure d’Agriculture de Purpan in 1990.
Mike Knetter, Ph.D - President & Chief Executive Officer, UW Foundation

Michael M. Knetter joined the University of Wisconsin Foundation as president and chief executive officer on October 16, 2010 after eight years as dean of the Wisconsin School of Business. As dean, he orchestrated the novel $85 million Wisconsin Naming Gift, the expansion of Grainger Hall and the restructuring and improved national standing of the full-time MBA. In addition to leading the business school, Knetter worked with the campus leadership team to develop strategies to increase revenue as vice chancellor for advancement beginning in 2010.

Prior to joining the UW-Madison in 2002, he was associate dean of the MBA program and professor of international economics in the Amos Tuck School of Business at Dartmouth College. He also served as senior staff economist for the President’s Council of Economic Advisors for former presidents George H.W. Bush and Bill Clinton.

A native of Wisconsin, Knetter is a director of American Family Insurance and serves as a trustee of Neuberger Berman Funds. Recently he chaired the capital campaign for The Road Home Dane County, a non-profit that assists in finding housing and work solutions for homeless families in Dane County.

Knetter completed his undergraduate studies in economics and mathematics at the University of Wisconsin-Eau Claire and his Ph.D. in economics at Stanford University.

Brian Hellmer

Brian Hellmer is the currently the Director of the Hawk Center for Applied Security Analysis at the University of Wisconsin-Madison’s School of Business (a CFA Program Partner). As part of this role, Mr. Hellmer trains future professional investors within a year-long class where MBA students manage over $50 million. Mr. Hellmer also
oversees the admissions process, employer relationship development and alumni relations for the Hawk Center.

From 1996 to 2009, Mr. Hellmer served as a Senior Portfolio Manager and Director of Research at Northern Capital Management, an employee owned high-net worth and institutional investment manager located in Madison Wisconsin. During his tenure, Mr. Hellmer helped grow the firm to over $2.3 billion in assets under management, and was co-portfolio manager of the firm’s growth fund that was named the Lipper’s “Growth Fund of the Year” in 2000. Mr. Hellmer and also managed various private wealth and institutional accounts invested in mid-cap equities and fixed income securities.

Prior to 1996, Mr. Hellmer worked for Bank of America’s investment subsidiary in Boston and Hartford as both an analyst and investment strategist. During his time at Bank of America, Mr. Hellmer covered various industries such as Retail, Media & Entertainment, Restaurants, Medical Devices and Financial Services.

Mr. Hellmer is a Chartered Financial Analyst and has a Certificate in Investment Performance Measurement from the CFA Institute. He holds both an MS and BBA degree in Finance from the Wisconsin School of Business. He currently serves on various charitable Boards of Directors, and recently served as Chairman of Care Wisconsin, Inc., a managed care organization based in Madison.

Mr. Hellmer is currently working to improve financial literacy through changes in educational standards and curriculum redesign for students throughout Wisconsin. One recent project was serving as a financial consultant to the animated children’s series “Secret Millionaire’s Club” featuring Warren Buffett, which originally aired on “The Hub” cable network and is now available for purchase from Amazon.com or iTunes.

Mark Ready, Ph.D - Academic Director, Hawk Center for Applied Security Analysis

Mark Ready holds the Jeffrey Diermeier Chair in the Department of Finance, Investment, and Banking at the Wisconsin School of Business. He is also the
department chair of Finance. He came to the University of Wisconsin-Madison in 1990, after completing his PhD at Cornell University.

From the outset, he has been able to bring a practical dimension to his courses, having spent seven years in various finance positions at Ford Motor Company before pursuing his Ph.D.

Ready’s research focus is in investments and he is well known and highly regarded in the academic community. His work has been cited in more than 450 separate articles published in finance and accounting journals, and he has served as associate editor for both the Review of Financial Studies and Financial Management. He has published studies examining risk and return of a variety of trading strategies, ranging from technical trading rules for timing market returns, to strategies that select individual stocks based on various fundamental measures.

Ready has taught both corporate and investments courses in the undergraduate, MBA, and executive programs, and he has served as chair of both the Finance Ph.D. program and the Quantitative Masters of Finance (QMF) program.

Ready’s work has drawn the attention and respect of practitioners and regulators.

He served on NASDAQ’s Economic Advisory Board from 1998-2000, and he was the chief economist and director of the Office of Economic Analysis at the U.S. Securities and Exchange Commission from April 2000 through January 2001.

Ready earned his Ph.D. from Cornell University.